
FORM SUMMARY

Name of Form: Summary Assignment – Petition

Form Number: PR-1840 (previously PR-1428)

Statutory Reference: §867.02, Wisconsin Statutes

Benchbook Reference: PR 8

Purpose of Form: Used to start summary assignment process of an estate. May include Special Administration.

Who Completes It: Petitioner or attorney administering the estate.

Distribution of Form: Original to court, copies to interested persons, copy to Department of Health and Family Services if necessary.

Accompanying Forms: Last Will and Testament, if any.

New Form/Modification: Modification; last update 06/00.

Modifications: Modified number 9 to further clarify which programs are subject to recovery by the Wisconsin Estate Recovery Program. In number 10, added check boxes to specify if spouse is living or deceased.

Comments: This form is used when:

- The estate cannot be summarily settled under §867.01, Wis. Stat., and
- The estate, less the amount of the debts for which any property in the estate is security, does not exceed \$50,000 (date of death after May 8, 2000) or \$30,000 (date of death before May 9, 2000) in value and the decedent is survived by a spouse or one or more minor children or both.

About this Form: This form is the product of the Wisconsin Records Management Committee, a committee of the Director of State Court's Office and a mandate of the Wisconsin Judicial Conference.

If you have additional information that does not change the meaning of the form, attach it on a separate page. The form itself shall not be altered.